

**Department of Medical Assistance Services** 

# Web Portal Provider Registration Users Guide

Version 2.1

# **HIPPA Privacy Rules**

The Health Insurance Portability and Accountability Act of 1996 (HIPAA – Public Law 104-191) and the HIPAA Privacy Final Rule provides protection for personal health information. The regulations became effective April 14, 2003. Affiliated Computer Services developed HIPAA Privacy Policies and Procedures to ensure operations are in compliance with the legislative mandate.

Protected health information (PHI) includes any health information whether verbal, written, or electronic, that is created, received, or maintained by Affiliated Computer Services. It is health care data, plus identifying information that allows someone using the data to tie the medical information to a particular person. PHI relates to the past, present, and future physical or mental health of any individual or recipient; the provision of health care to an individual; or the past, present, or future payment for the provision of health care to an individual. Claims data, prior authorization information, and attachments such as medical records and consent forms are all PHI.

The Privacy Rule permits a covered entity to use and disclose PHI, within certain limits and providing certain protections, for treatment, payment, and health care operations activities. It also permits covered entities to disclose PHI without authorization for certain public health and workers' compensation purposes, and other specifically identified activities.

<sup>45</sup> CFR Parts 160 and 164, Standards for Privacy of Individually Identifiable Health Information; Final Rule

# **Revision History**

| Document<br>Version | Date       | Name                              | Comments  |
|---------------------|------------|-----------------------------------|---|
| 1.0                 | 05/15/2010 | ACS Transition<br>Web Portal Team | Initial Document<br>Creation                                    |
| 2.0                 | 06/06/2010 | ACS Transition<br>Web Portal Team | Revisions made<br>based on<br>comments<br>received from<br>DMAS |
| 2.1                 | 6/19/2010  | ACS Transition<br>Web Portal Team | Additional revisions made based on comments received from DMAS  |
|                     |            |                                   |   |
|                     |            |                                   |   |

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# 0.0 Introduction

The Commonwealth of Virginia's Medicaid Web Portal is a web based system that gives providers and their user organizations access to secured provider services.

The Portal extends the business capabilities of Virginia providers by offering user-friendly tools and resources. You will have access to the secured interactive features of the portal including:

- Claims Status Inquiry
- Member Eligibility and Member Service Limits
- Service Authorization Log and Pharmacy Web PA Request
- Provider Payment History

In the near future new services will be added that will give you the following capabilities:

- Automated Provider Enrollment
- Claim submission through the portal
- Ability to update demographic information such as address, phone numbers and email addresses online

In order to take advantage of the Portal and its functions, users must be part of the security structure.

For the sake of this document, a 'user' is defined as any person that will access and use the Web Portal.

If at any time during the registration process you have questions or issues, please contact the Affiliated Computer Services (ACS) Helpdesk toll free at 866-352-0496.

# **0.1** Security Structure

The security structure of the Web Portal is provider centric versus user centric, which you may have been familiar with previously.

Security access for the Web Portal is based upon a provider organization. A 'provider organization' is defined as either an individual billing or servicing provider or group provider (and the user community in support of them).

The provider organization can be associated with either a NPI (National Provider Identifier) or an API (Atypical Provider Identifier – assigned by the Commonwealth of Virginia for providers that are not eligible for a NPI, such as a transportation provider).

A unique User ID will need to be established for each provider organization a user supports. Any users added to the organization will have the ability to access services based on the role they are assigned.

#### 0.2 User Roles

There is a three-tiered security structure associated with each provider organization. Additional roles will be provided as new services are added.

**Primary Account Holder** – A Primary Account Holder is the person who will perform the initial web registration. He/she will establish the security needed for the services accessed.

Each provider organization can have only one Primary Account Holder. To change a Primary Account Holder, the Provider will need to notify Affiliated Computer Services (ACS), in writing.

The Primary Account Holder can

- Establish Organization Administrators and/or Authorized Users for their organization
- Change roles for any user
- Reset passwords for any user
- Activate and/or deactivate any user
- Unlock any User ID
- Access to all secured provider functionality

**Organization Administrator** – An Organization Administrator is established by the Primary Account Holder.

An Organization Administrator is not required for a provider organization - some organizations may only have a Primary Account Holder and associated Authorized Users. A provider organization can have one-to-many Organization Administrators, if so desired. Organization Administrators tier up to the Primary Account Holder.

The Organization Administrator has the following capabilities associated with only Authorized Users:

- Can establish Authorized Users for their organization
- Can change roles for any Authorized User
- Can reset passwords for any Authorized User
- Can activate and/or deactivate any Authorized User
- · Can unlock any Authorized User ID
- Has access to all secured provider functionality

**Authorized User** - The Authorized User is responsible for performing provider support functions.

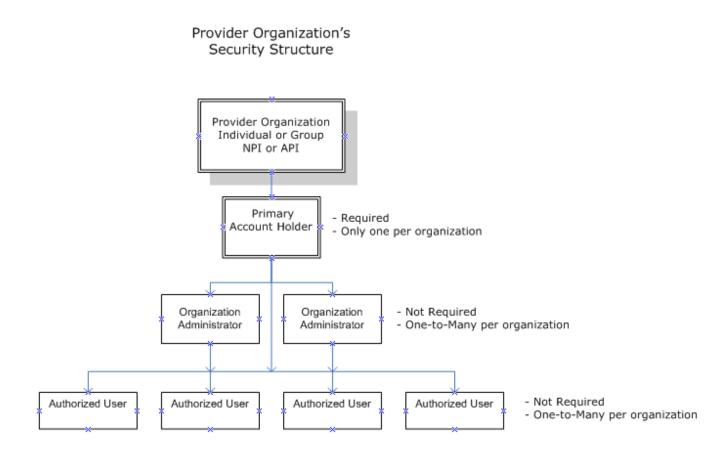
Authorized Users are not required for a provider organization, but an organization can have one-to-many Authorized Users, if so desired. Authorized Users tier up to the Organization Administrators.

The Authorized User has the following capabilities:

Has access to all secured provider functionality

Within the provider organization's security structure, the users within each tier are accessible within the system to all users in the tiers above. All Authorized Users can be accessed and user maintenance performed for them by all Organization Administrators and the Primary Account Holder.

The following reflects the security structure for each provider organization.



# **0.3 Overall Registration Process**

The Web Registration process for new provider organizations must be completed by the Primary Account Holder.

The registration process involves the following three steps:

- 1. Establish a User ID, password and security profile
- 2. Initiate the authentication process
- 3. Complete identity authentication with the Security ID generated and mailed to the provider

#### Step 1 - Establish a User ID, Password and Security Profile

As the Primary Account Holder you must first create a User ID and password and answer three unique security questions which will enable you to access the system if you forget your User ID or password

For more details, please see 2.3 *Creating a User Profile* or 2.6 *Creating a Security Profile*.

#### **Step 2 – Initiate the Authentication Process**

The Primary Account Holder will request a Security ID by checking the 'Request Security ID' box in the quick links. The Security ID will be generated and mailed to the provider. For more complete instructions, please refer to 3.0 Requesting a Security ID.

While awaiting receipt of the Security ID, you may begin to establish your user organization. To begin creating a user organization security structure, please refer to 5.0 Establishing a User Organization.

Once the Security ID is applied, it will be associated with all users established in your user organization.

Note: If you are associated with a provider not currently enrolled in the Virginia Medicaid program, you will need to wait for the Provider Enrollment Services to approve the application before requesting a Security ID.

#### Step 3 - Complete Identity Authentication with the Security ID

Upon receipt of the Security ID from the provider or group administrator, you need to apply the Security ID. To apply the Security ID, you will select the 'Apply Security ID' quick link. Your security profile will be presented along with the two fields associated with the Security ID. Enter the Security ID in the appropriate field. For more complete instructions, please refer to section 4.0 Applying the Security ID.

After the Security ID is applied, your user authentication will be complete. Once authenticated, the Security ID will be associated to you as the Primary Account Holder and any previously established users within your organization. You or your designated Organizational Administrator may continue to establish your user organization.

To begin creating a user organization security structure, please refer to 5.0 Establishing a User Organization.

#### 0.4 Users Converted from FHSC UAC

All active user records existing in First Health's UAC have been converted over to the Virginia Medicaid Web Portal's user table.

There are two outreach efforts underway for converted users. Provider organizations will either be contacted by the ACS Help Desk or letters will be issued to the provider or group provider administrator detailing the converted users associated with the provider. The letter details the converted User IDs and temporary passwords associated with each user.

Outreach will begin in early June in enough time for existing FHSC users to establish and/or validate their new provider organization security structure prior to the FHSC portal switch to the new Medicaid Web Portal.

The new Virginia Medicaid Web Portal will be available for registration verification purposes (only for those users previously registered on the First Health Web Portal) starting June 1, 2010. The fully functional web portal will be available starting June 28, 2010 at 7 A.M.

The FHSC web site will be available until June 27, 2010. During that time if your password expires or needs to be reset, you can continue to change your password or the FHSC Help Desk will continue to be able to reset passwords.

New users will no longer be able to register after May 25, 2010.

The new Virginia Medicaid Web Portal will have all of the functionality the First Health Services Corp (FHSC) web portal contained. In the near future, the Virginia Department of Medical Assistance Services (DMAS) will be rolling out other exciting new features such as online claims data entry, online provider enrollment application submission and online provider profile updates.

An important difference to be aware of is where the FHSC web portal was user centric, the new Virginia Medicaid Web Portal is provider centric. The provider centric security will allow for the security level needed for the today's functionality but also for the added security needed for future planned functionality.

With the current FHSC web portal functionality a single User ID can be used for one to many associated providers (NPI). With the new Web Portal, each provider organization (a single provider or group provider) will require a unique User ID.

During the conversion process, if you were associated to multiple providers in the UAC your User ID was made unique by the addition of a hyphen and a single digit number. For instance the UAC User ID 'JDoe' associated with three individual providers would now have 'JDoe', 'JDoe-1' and 'JDoe-2'. Each of these User IDs will be uniquely associated with a single provider NPI.

User roles were converted as follows:

Each provider organization will have one (1) Primary Account Holder and one to many Organization Administrator(s). Delegated and Local Administrators in the UAC with managed users have been converted to Organization Administrators in the new portal. If the provider organization had only one Delegated (or Local) Administrator, that user has been converted to the Primary Account Holder. If there were multiple DelAdmins for a provider organization then the selection as to who is to be designated as the Primary Account Holder will need to be made in writing.

# 1.0 Web Portal Access

The new Virginia Medicaid Web Portal can be accessed through the following link: <a href="https://www.virginiamedicaid.dmas.virginia.gov">www.virginiamedicaid.dmas.virginia.gov</a>



The Web Portal is available daily 24 x 7 with the exception of routine maintenance which will be posted in advance.

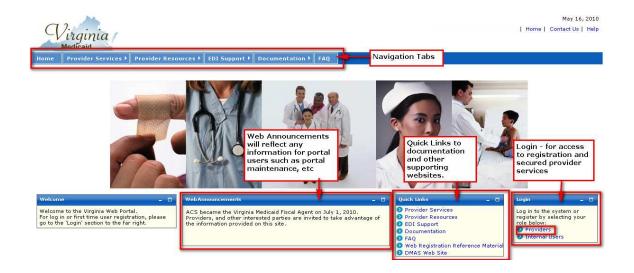
The following sections will outline the basic functionality of the portal.

Note: Not all the portlets and tabs will be available for early registration on June 1, 2010, only those in support of the registration process. All the information that follows is applicable after ACS takes over as the fiscal agent on June 28, 2010.

#### 1.1 Medicaid Web Portal – Home Page

The Commonwealth of Virginia Medicaid Web Portal's home page contains various portlets (sections within a portal page) and navigational tabs.

The Web Portal's Home Page is reflected below:



#### 1.1.1 Navigation Tabs

**Provider Services** – This tab provides access to the following:

- Provider Enrollment access to provider enrollment applications for downloading
- Provider Manuals access to provider manuals, service center user manuals, dental manuals and forms
- Medicaid Memos to Providers Medicaid Memorandums from DMAS to the provider community
- DMAS Provider Services link to Provider Services on the Department of Medical Assistance Services web site
- DMAS Pharmacy Services link to Pharmacy Services on the Department of Medical Assistance Services web site

**Provider Resources** – This tab provides access to the following:

- Provider Manuals access to provider manuals, service center user manuals, dental manuals and forms
- Provider Links links to Center of Medicare and Medicaid Services, DMAS and Virginia.gov websites
- Provider Training access to the provider training library

- Web Registration access to Registration FAQ, a Registration Quick Reference Guide, this Registration User's Guide and access to the Registration tutorial
- Automated Response System (ARS) access to the ARS Users Guide, ARS FAQ and ARS tutorials
- Search for Provider link to Search for Provider on the Department of Medical Assistance Services web site

#### **EDI Support** – This tab provides access to the following:

- EDI Companion Guides links to the EDI companion guides for support of EDI transactions
- EDI FAO Frequently Asked Questions on EDI transactions
- EDI Testing Guidelines for EDI testing
- EDI Forms and Links access to EDI forms and links

#### **Documentation** – This tab provides access to the following:

- Provider Forms access to various forms in support of provider services
- Paper Claim Forms access to various claims forms for download

#### **FAQ** – This tab provides access to the following:

- ARS FAQ
- EDI FAQ
- Registration FAQ

#### 1.1.2 Home Page Portlets – Web Announcements

**Web Announcements** – this portlet contains any information that is applicable to all portal users such as maintenance down time, new policies, etc

#### 1.1.3 Home Page Portlets - Quick Links

**Quick Links** – this portlet list links to documents or websites that are applicable to the audience viewing this portal page. Quick Links will be located on various portal pages. For consistency and availability to common information, the first five (5) links will always be the same as the navigation tabs:

- Provider Services
- Provider Resources
- EDI Support
- Documentation
- FAO

In addition there are links that are applicable to that portal page.

For the Home Page, the additional quick links are the following:

- Web Registration Reference Material access to Registration FAQ, a Registration Quick Reference Guide, this Registration User's Guide and access to the Registration tutorial
- **DMAS Web Site** link to the website for the Department for Medical Assistance Services

#### 1.1.4 Home Page Portlets - Login

This portlet is used for logging in to the pages needed for secured login. The login choice is based upon the user's role. For registration and access to secured provider functionality, select the 'Provider' role.

# 1.2 Medicaid Web Portal - Provider Login Page

After selecting the 'Provider' role in the Web Portal Home Page, the provider and the supporting user community are directed to the Provider Login Page.

The Provider Login Page is reflected below:

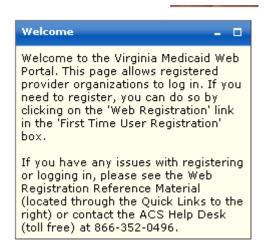


There are three portlets on this page different from the Web Portal Home Page.

- Welcome portlet
- First Time User Registration portlet
- Existing User Login portlet

#### 1.2.1 Welcome Portlet

The Welcome portlet is reflected below:



This portlet contains general instructions as well as mechanisms to handling issues or questions:

- Web Registration Reference Material from the quick links
- ACS Help Desk toll free number

#### 1.2.2 First Time User Registration Portlet

The First Time User Registration portlet is reflected below:



This portlet outlines the steps needed for completing the registration process. Only the user designated as the Primary Account Holder should complete the registration process.

Users that are not designated as the Primary Account Holder should contact their Primary Account Holder or Organization Administrator for their User ID and temporary password.

As the Primary Account Holder, not previously registered (or converted from the UAC), you'd select 'Web Registration' link on this portlet.

#### 1.2.3 Existing User Login Portlet

Once you have established your User and Security Profiles, you will have access to the portal functionality for such things as requesting and applying a Security ID or accessing secured provider services.

The Existing User Login portlet is reflected below:



This portlet is used for applying a registered user's User ID and password. Both are required fields (indicated with a red asterisk \*) for the login process.

**User ID** – this is the User ID created during the registration process when establishing your User Profile (see section 2.3 Creating a User Profile).

Note: If a previous FHSC UAC user, your User ID will be the ID sent in a letter to your Provider (or Administrator for a Group Provider).

**Password** – this is the Password created during the registration process when establishing your User Profile.

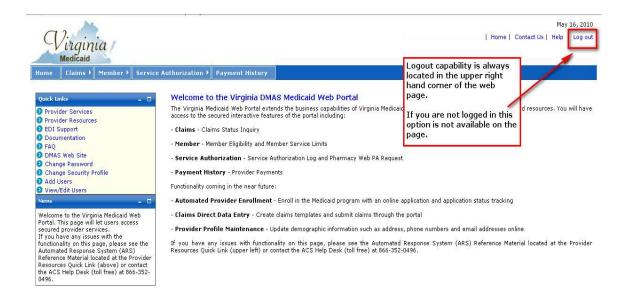
Note: If a previous FHSC UAC user, your password will be the temporary password sent in a letter to your Provider (or Administrator for a Group Provider).

Enter your User ID and Password and click 'Submit'

The Forgot User ID and Forgot Password are addressed in further detail in sections 2.5 Forgot User ID and 2.6 Forgot Password.

# 1.3 Log Out

The log out functionality is available on any secured web portal page. The Log Out link is reflected below:



If you are not logged in and are still on public pages, this link is not available as it's not applicable until you've accessed secured portal pages.

# 2.0 Registration Process

# 2.1 Who Can Register?

Only the user designated as the Primary Account Holder should complete the registration process.

If you were a previous user on the FHSC Portal, the UAC has been converted (see section 0.4 Users Converted from the FHSC UAC) and there is no need to register. You can login and continue the process of completing your User and Security Profile (see sections 2.3 Creating a User Profile and 2/4 Creating a Security Profile).

Users that are not designated as the Primary Account Holder should not register and should contact their Primary Account Holder or Organization Administrator for their User ID and temporary password.

# 2.2 Why Would I Need to Register?

In order to gain access to the secured provider functions such as member eligibility and service limits, claims status inquiry, service authorization inquiry and payment history, you will need to be a registered portal user. By registering, requesting a Security ID and applying that Security ID, the system has the mechanism to authenticate you as the Primary Account Holder.

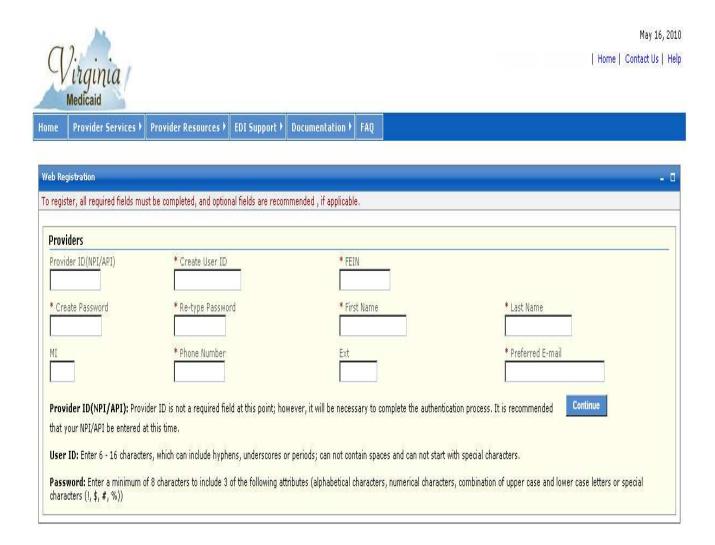
Once authenticated, you will be able to establish your provider organization. Doing so will give all the users within your organization the access to secured functionality, based on their specific role.

# 2.3 Creating a User Profile

Once you've clicked on 'Web Registration' from the First Time User Registration portlet (see section 1.2.2 First Time User Registration Portlet) you will be directed to the User Profile.

Note: For converted FHSC UAC users, the first time you login (see section 1.2.3 Existing Users Login Portlet) you will also be routed to the User Profile to complete any missing information.

The User Profile portal page is reflected below:



The User Profile is part of the registration process and contains the following information. Any information that is required (noted with a red asterisk \*) will need to be supplied by you at the initial login. Any optional fields that are known are recommended to be completed at this time as well.

- Provider ID (NPI/API)
- User ID \*
- NPI's FEIN
- Password \*
- First Name \*
- Last Name \*
- Middle Initial
- Phone Number \*
- Extension
- Preferred email \*

**Provider ID (NPI/API)** (optional) – Though this field is not a required field at this point, in order to complete the authentication process your User ID will need to be associated to an individual or group NPI (or API).

If the NPI (or API) is known at this time, it should be entered at this time.

In the case of an atypical provider, an API number might not yet be assigned. The authentication process can not be completed until the NPI or API is entered, but the User and Security Profiles can be established in the interim.

**Create User ID \*** (required) – You will need to establish a unique User ID that will be associated with this individual or group provider.

The User ID must be a minimum of 6 characters and a maximum of 16 characters. It can include hyphens, underscores or periods. The User ID can not start with special characters nor can it contain spaces.

**FEIN** (optional) - Enter the FEIN associated with the individual or group provider

**Create Password** \* (required) – Establish a password to be used in conjunction with your User ID to authenticate you at the time of login.

The portal password must be a minimum of 8 characters and must include three (3) of the following four (4) requirements:

- Capital/Upper case letter
- Lower case letter
- Number
- Special character (!, \$, #, %)

**Re-type Password** \* (required) – Re-enter the password from the 'Create Password' box as a secondary check

First Name \* (required) – Enter your first name

**Last Name** \* (required) – Enter your last name

Middle Initial (optional) – Enter your middle initial

**Phone Number** \* (required) – Enter your contact phone number

**Ext (Extension)** (optional) – If the phone number entered is a work number with a corresponding extension, enter the extension here

**Preferred E-mail** \* (required) – Enter the email address where you wish to receive messages. This will be used only for sending temporary passwords in the case of a forgotten password or sending the User ID associated to this provider in the case of a forgotten ID

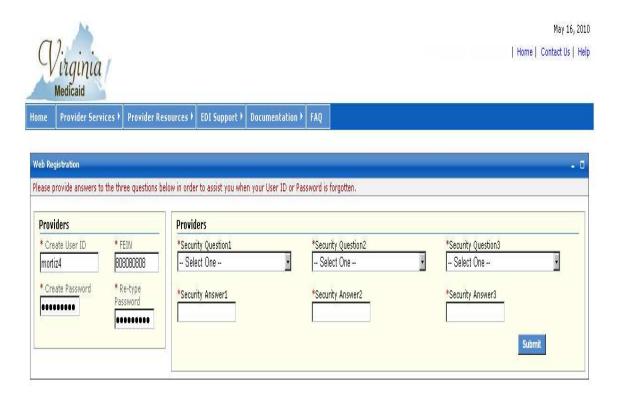
After completing all required and known/applicable optional fields, click on 'Continue'.

You will be taken to the Security Profile to continue the registration process.

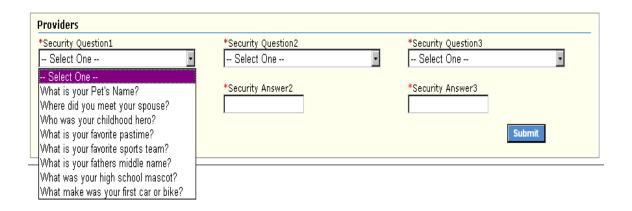
# 2.4 Creating a Security Profile

The Security Profile is used to gather three (3) different security questions. These questions will be used for user self-help with forgotten passwords and User IDs.

The User Profile portlet is reflected below:



You will need to complete all three security questions. Each question must be unique.



The question choices are as follows:

- What is your Pet's Name?
- Where did you meet your spouse?
- Who was your childhood hero?
- What is your favorite pastime?
- What is your favorite sports team?
- What is your father's middle name?
- What is your high school mascot?
- What make was your first car or bike?

After completing the three security questions, click 'Submit' to complete your Security Profile. This completes the registration process.

You will be taken to the Primary Account Holder's Welcome Page (below). This page will let you start the second step in the authentication process, requesting a Security ID, or log out to return later.





above) or contact the ACS Help Desk (toll

free) at 866-352-0496.

#### Welcome to the Virginia DMAS Medicaid Web Portal

Thank you for registering for access to the Virginia Medicaid Web Portal. You've successfully completed the first step in the registration process.

As the Primary Account Holder for your organization, you will need to initiate and complete the authentication process with the use of a Security ID. Requesting and applying a Security ID is a one time process to be completed only by the Primary Account Holder.

Step2 - Initiate the Authentication Process - click 'Request Security ID' on the Quick Links to the left

To request a Security ID, click on 'Request Security ID' from the Quick Links on the left. Your security profile will be presented along with two new fields associated with the Security ID. Check the 'Request Security ID' box. The Security ID will be generated and mailed to the provider or administrator (if a group provider) associated with your User ID from the registration process. For more complete instructions, please refer to the Web Registration Quick Reference.

While awaiting receipt of the Security ID, you may begin to establish your organization. To begin creating (or modifying) a user organization, click 'Add Users' or 'View/Edit Users' from the Quick Links on the left. For more complete instructions, please refer to the Quick Reference for Establishing a Provider Organization. Once the Security ID is applied, it will be associated with all users you've previously established.

If you are a new user associated with a provider not currently enrolled in the Virginia Medicaid Program, you will need to wait for the Provider Enrollment Services to approve your application before you can request a Security ID.

Step 3 - Complete Identity Authentication with the Security ID - click 'Apply Security ID' that will be displayed on the Quick Links to the left

Upon receipt of the Security ID from your provider or group administrator, you need to apply the Security ID. To apply the Security ID, click on 'Apply Security ID' from the Quick Links on the left. Your security profile will be presented along with the two fields associated with the Security ID. Enter the Security ID in the appropriate field. For more complete instructions, please refer to the Web Registration Quick Reference

After the Security ID is applied, your user authentication will be complete. Once authenticated, the Security ID will be associated to you as the Primary Account Holder and any previously established users within your organization. You or your designated Organization Administrator may continue to establish your user organization.

To begin creating (or modifying) your user organization, click 'Add Users' or 'View/Edit Users' from the Quick Links on the left. For more complete instructions, please refer to the Quick Reference for Establishing a Provider Organization.

# 2.5 Forgot User ID

Once you've completed your User and Security Profiles, you are able to leverage the user self help capabilities of the portal. Authorized Users who forget their User ID can get with their Primary Account Holder or any Organization Administrator associated with this provider organization. They have the capability to look up the User IDs. An Organization Administrator can check with the Primary Account Holder.

All roles have the ability to also request their User ID be emailed to them.

On the Provider Login Page, in the Existing Users Login portlet there is an option for Forgot User ID?



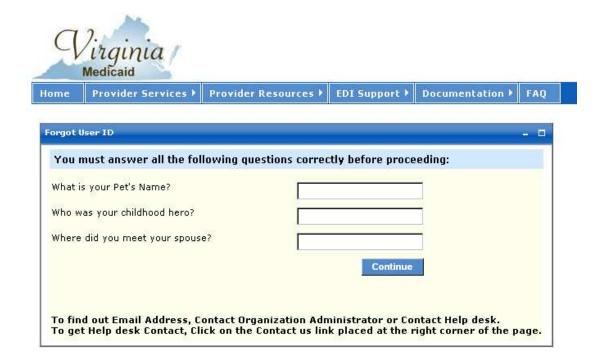
Select 'Forgot User ID?'



**Enter your Email Address:** - this must be the preferred email that was entered in your User Profile at the time of initial entry (or the last update to your User Profile).

**Provider ID (NPI/API):** - enter the NPI or API associated with your User ID

Click 'Continue' and you will be routed to the portlet below.



This portlet will display the three questions you chose when establishing your Security Profile.

You must complete all three of these questions, giving the same answers as you established in your Security Profile.

Upon completing the answers, click 'Continue' to invoke the validation of answers to your Security Profile.

After successful validation you will receive the following portlet:



Your User ID will be emailed to the email address entered in your User Profile.

The following is a sample email with the User ID removed:

| Your Forgot User ID request has been processed.   |
|---|
| Your User ID is:  |
|   |
| Please use this to log in to the Virginia Medicaid Web Portal at <a href="https://www.virginiamedicaid.dmas.virginia.gov">https://www.virginiamedicaid.dmas.virginia.gov</a> . Please contact the ACS Web Support Call Center, toll free, at 1-866-352-0496 if you have any questions or problems regarding your web portal registration. |
| Note: This is an auto-generated email, please do not reply.   |
|   |

# 2.6 Forgot Password

Once you've completed your User and Security Profiles, you are able to leverage the user self help capabilities of the portal. Authorized Users who forget their password can get with their Primary Account Holder or any Organization Administrator associated with this provider organization. They have the capability to generate a temporary password. An Organization Administrator can check with the Primary Account Holder.

All roles have the ability to also request their password be emailed to them.

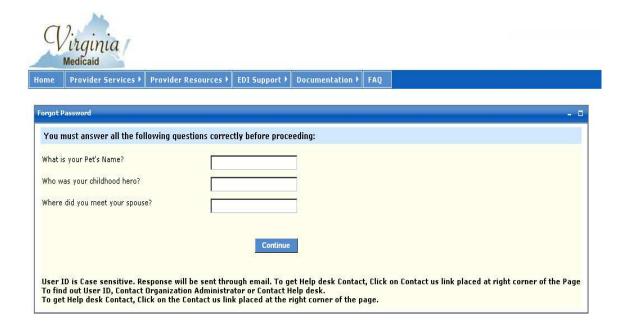
On the Provider Login Page, in the Existing Users Login portlet there is an option for Forgot Password?



Select 'Forgot Password?'



**Enter your User ID:** - enter your User ID created in your User Profile Click 'Continue' and you will be routed to the following portlet:



This portlet will display the three questions you chose when establishing your Security Profile.

You must complete all three of these questions, giving the same answers as you established in your Security Profile.

Upon completing the answers, click 'Continue' to invoke the validation of answers to your Security Profile.

After successful validation you will receive the following portlet:



A temporary/one-time use password will be emailed to the email address entered in your User Profile.

The following is a sample email:



This temporary password will be used for login. You will immediately be taken to your User Profile and will be required to enter another password.

# 3.0 Requesting a Security ID

# 3.1 Why Do I Need a Security ID?

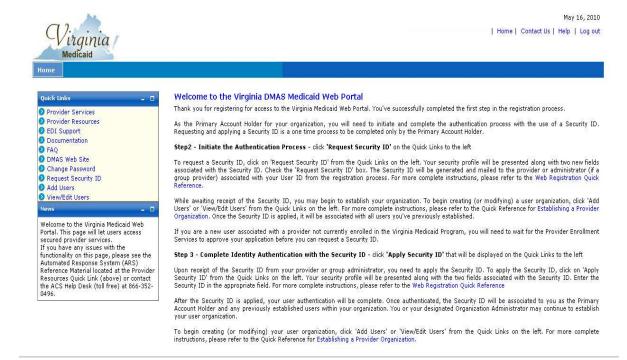
As the Primary Account Holder for your organization, you will need to initiate and complete the authentication process with the use of a Security ID. Requesting and applying a Security ID is a one time process to be completed only by the Primary Account Holder.

# 3.2 Accessing the Security Profile

To request a Security ID, you will need to access the Primary Account Holder Welcome Page. After completion of the Security Profile, you will be immediately taken to this page (see section 2.4 Creating a Security Profile).

If you've logged out after completing the Security Profile the following steps will direct you back to the Primary Account Holder Welcome Page.

- On the Medicaid Web Portal Home Page select 'Provider' from the Login portlet
- On the Provider Login Page enter your User ID and password in the Existing User Login
- You will be directed to the Primary Account Holder Welcome Page



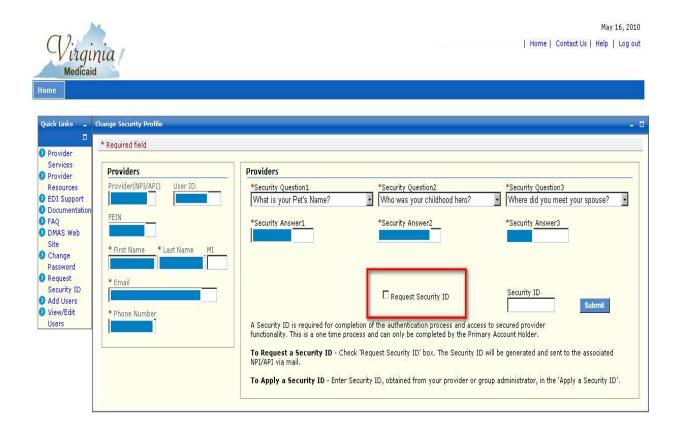
On the Quick Links to the left is a link to 'Request a Security ID'.



Clicking on the 'Request Security ID' link will direct you to your Security Profile.

#### 3.3 Requesting a Security ID

Your security profile will be presented along with two new fields associated with the Security ID.



Check the 'Request Security ID' box and click 'Submit'

The Security ID will be generated and mailed to the provider or administrator (if a group provider) associated with your User ID from the registration process.



While awaiting receipt of the Security ID, you may begin to establish your organization (see section 5.0 Establishing an Organization).

Once the Security ID is applied, it will be associated with all users you've previously established.

If you are a new user associated with a provider not currently enrolled in the Virginia Medicaid program, you will need to wait for the Provider Enrollment Services to approve your application before you can request a Security ID.

### 3.4 Security ID Notification Letter

A Security ID Notification Letter will be sent via mail to the Provider or Administrator (if a group provider).

Upon receipt, the provider or administrator will need to furnish the Primary Account Holder with this information.

A sample notification letter is below:

Date

NPI (or) Group NPI Name Address (Correspondence Address from MMIS) City, State Zip

Re: Virginia Medicaid Web Portal Registration Security ID

Dear [Provider First, MI Last, Title] (or) Administrator for Group NPI Name:

Thank you for requesting a Security ID for the Virginia Medicaid Web Portal www.virginiamedicaid.dmas.virginia.gov

Your Security ID is: 9999999999

In order to complete your registration process you must navigate to the Virginia Medicaid Web Portal <a href="https://www.virginiamedicaid.dmas.virginia.gov">www.virginiamedicaid.dmas.virginia.gov</a> and take the following steps:

- 1. Click on 'Providers' from the portal home page
- 2. Login using the User ID and Password previously created when establishing your User Profile
- 3. Select 'Change Security Profile' from the Quick Links
- 4. Enter the Security ID from this letter sent and 'Submit'

Upon entering 'Submit' your User ID, NPI/API and Security ID combination will be validated, authenticating you as the as the Primary Account Holder.

#### Security Roles:

- Primary Account Holder (PAH) Only one PAH per provider organization is allowed. The PAH has the authority to establish and maintain Organization Administrator and Authorized Staffroles (change roles or passwords, activate, deactivate and unlock IDs).
- Organization Administrator (OrgAdmin) The OrgAdmin has the authority to establish and maintain Authorized Staff roles (change roles or passwords, activate, deactivate and unlock IDs).
- Authorized Staff -Authorized Staff are users with inquiry only capability to the provider
  portal functionality.

1 of 2

#### To Add Users (Only Accessible to the PAH & OrgAdmin Users):

- 1. Log In using your User ID and Password
- 2. Select 'Add Users' from the Quick Links
- 3. Complete the information for the user to be added including a new user's initial password and the role the user is to function as and select 'Add'
- 4. Share the newly established User ID and Temporary Password with the new user

Newly added users can log in to the portal immediately using the User ID and initial password. Upon initial log on, the new user will be required to change their password and establish their own security profile.

#### Maintain Existing Users (Only Accessible to the PAH & OrgAdmin Users):

- 1. Log In using your User ID and Password
- 2. Select 'View/Edit Users' from the Quick Links
- 3. Search for the existing user to update by either name or User ID (partial or exact)
- Update existing user as needed (i.e. role).

For detailed instructions on adding and maintaining users and establishing their roles, please see the Web Registration Reference Material on the portal's Provider Resources tab.

Upon completion of your registration, the PAH and his/her associated users will have access to the Automated Response System (ARS) functionality, including:

- Member Eligibility
- Member Service Limits
- · Service Authorization Inquiry
- Claims Status Inquiry
- Payment History Inquiry

If you have any questions with regards to the Security ID/Registration process or user maintenance, please contact the ACS Web Support Call Center, toll free, at 1-866-352-0496.

Sincerely,

Affiliated Computer Services, Inc A Xerox Company

# 4.0 Applying the Security ID

## 4.1 Accessing the Security Profile

To apply a Security ID, you will need to access the Primary Account Holder Welcome Page.

You need to access the Primary Account Holder Welcome Page.

- On the Medicaid Web Portal Home Page select 'Provider' from the Login portlet
- On the Provider Login Page enter your User ID and password in the Existing User Login
- You will be directed to the Primary Account Holder Welcome Page



Registration Reference Material (located at the Provider Resources Quick Links

above) or contact the ACS Help Desk (toll

free) at 866-352-0496.

#### Welcome to the Virginia DMAS Medicaid Web Portal

Thank you for registering for access to the Virginia Medicaid Web Portal, You've successfully completed the first step in the registration process,

As the Primary Account Holder for your organization, you will need to initiate and complete the authentication process with the use of a Security ID. Requesting and applying a Security ID is a one time process to be completed only by the Primary Account Holder.

| Home | Contact Us | Help | Log out

Step2 - Initiate the Authentication Process - click 'Request Security ID' on the Quick Links to the left

To request a Security ID, click on 'Request Security ID' from the Quick Links on the left, Your security profile will be presented along with two new fields associated with the Security ID. Check the 'Request Security ID' box. The Security ID will be generated and mailed to the provider or administrator (if a group provider) associated with your User ID from the registration process. For more complete instructions, please refer to the Web Registration Quick Reference.

While awaiting receipt of the Security ID, you may begin to establish your organization. To begin creating (or modifying) a user organization, click 'Add Users' or 'View/Edit Users' from the Quick Links on the left. For more complete instructions, please refer to the Quick Reference for Establishing a Provider Organization. Once the Security ID is applied, it will be associated with all users you've previously established.

If you are a new user associated with a provider not currently enrolled in the Virginia Medicaid Program, you will need to wait for the Provider Enrollment Services to approve your application before you can request a Security ID.

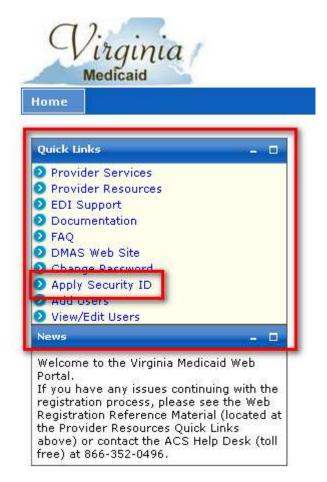
Step 3 - Complete Identity Authentication with the Security ID - click 'Apply Security ID' that will be displayed on the Quick Links to the left

Upon receipt of the Security ID from your provider or group administrator, you need to apply the Security ID. To apply the Security ID, click on 'Apply Security ID' from the Quick Links on the left. Your security profile will be presented along with the two fields associated with the Security ID. Enter the Security ID in the appropriate field. For more complete instructions, please refer to the Web Registration Quick Reference

After the Security ID is applied, your user authentication will be complete. Once authenticated, the Security ID will be associated to you as the Primary Account Holder and any previously established users within your organization. You or your designated Organization Administrator may continue to establish your user organization.

To begin creating (or modifying) your user organization, click 'Add Users' or 'View/Edit Users' from the Quick Links on the left. For more complete instructions, please refer to the Quick Reference for Establishing a Provider Organization.

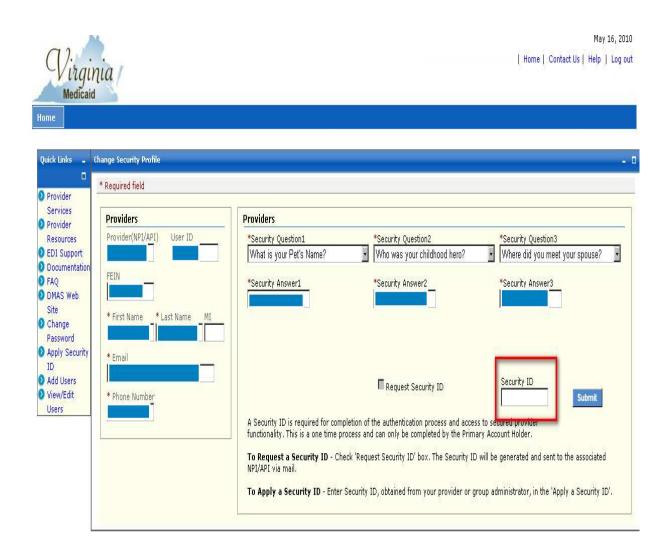
On the Quick Links to the left is a link to 'Apply Security ID'.



Clicking on the 'Apply Security ID' link will direct you to your Security Profile.

### 4.2 Applying the Security ID

Your security profile will be presented along with two new fields associated with the Security ID.



You will need to enter the Security ID that your provider or group administrator received in the mail.

Enter that number in the 'Security ID' box and click 'Submit'

Upon successful validation, the following page will be displayed:



In order to engage your updated security role and initiate the secured functionality associated with it, you'll need to log out and log in again. You can log out via the link in the portlet or in the upper right hand corner.

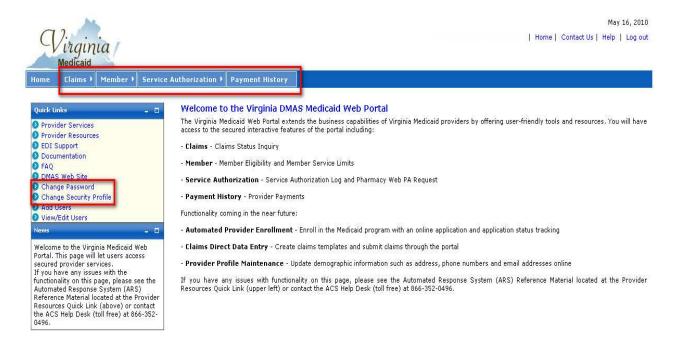
You need to access the Provider Home Page.

- On the Medicaid Web Portal Home Page select 'Provider' from the Login portlet
- On the Provider Login Page enter your User ID and password in the Existing User Login
- You will be directed to the Provider Home Page



#### 4.3 Provider Secured Functions

Once authenticated, you and any user you've established within your provider organization will have access to secured provider functions.



Tabs on the top of the page will navigate you to the following secured provider functions:

Claims – Claims Status Inquiry

Member – Member Eligibility and Member Service Limits

Service Authorization – Service Authorization Log

Payment History – Provider Payments

For more details on these functions, please refer to the Automated Response System (ARS) Users Guide.

On the left within the Quick Links section are two maintenance links that any user can leverage.

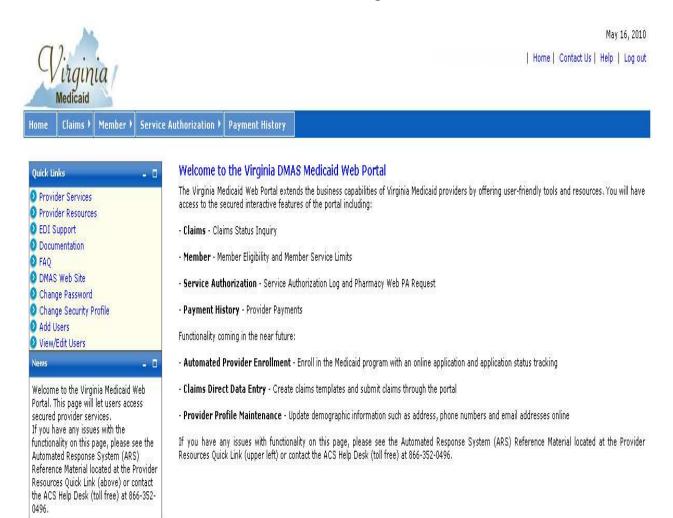
**Change Password** – let's any user change their password **Change Security Profile** – let's any user update their security questions

# 5.0 Establishing a User Organization

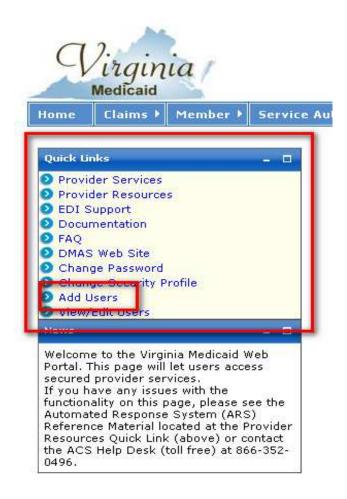
#### 5.1 Accessing the Add Users Page

To begin establishing a user organization, you need to access the Provider Home Page.

- On the Medicaid Web Portal Home Page select 'Provider' from the Login portlet
- On the Provider Login Page enter your User ID and password in the Existing User Login
- You will be directed to the Provider Home Page



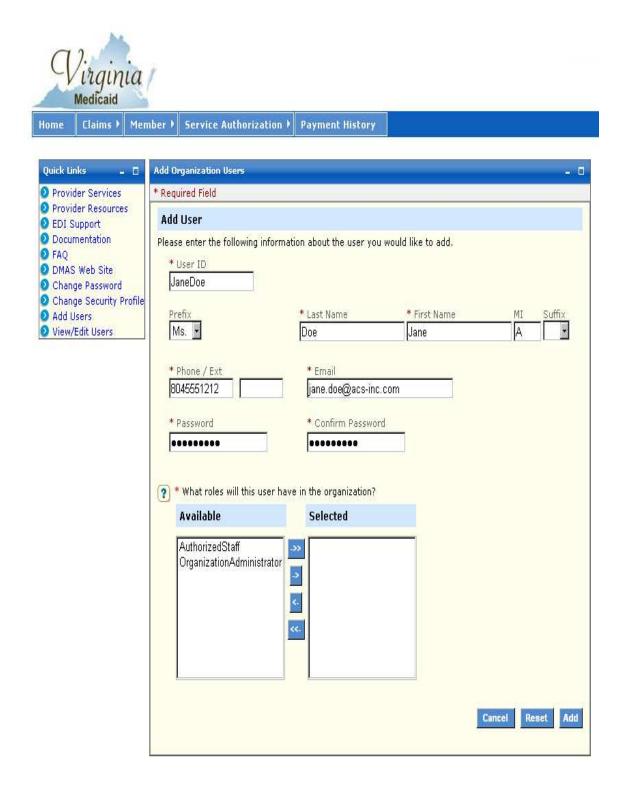
From the Quick Links on the left, click on the 'Add Users' link. The 'Add Users' link will only display for Primary Account Holders and Organization Administrators.



Clicking on the 'Add Users' link will direct you to the 'Add Organization Users' page.



## 5.2 Adding an Organization Administrator



You will need to complete a User Profile for the Organization Administrator you wish to add.

Any information that is required (noted with a red asterisk \*) will need to be supplied. Any optional fields that are known are recommended to be completed at this time as well.

- User ID \*
- Prefix
- Last Name \*
- First Name \*
- Middle Initial
- Suffix
- Phone Number \*
- Extension
- Email \*
- Password \*
- Confirm Password \*

**User ID \*** (required) – You will need to establish a unique User ID for this Organization Administrator

The User ID must be a minimum of 6 characters and a maximum of 16 characters. It can include hyphens, underscores or periods. The User ID can not start with special characters nor can it contain spaces.

**Prefix** (optional) – Enter an applicable prefix from the drop down list

**Last Name** \* (required) – Enter the Organization Administrator's last name

**First Name** \* (required) – Enter the Organization Administrator's first name

**Middle Initial** (optional) – Enter the Organization Administrator's middle initial

**Prefix** (optional) – Enter the Organization Administrator's suffix if applicable

**Phone Number** \* (required) – Enter the Organization Administrator's contact phone number

**Ext (Extension)** (optional) – If the phone number entered is a work number with a corresponding extension, enter the extension here

**E-mail** \* (required) – Enter the email address where the Organization Administrator is to receive messages. This will be used only for sending temporary passwords in the case of a forgotten password or sending the OrgAdmn's User ID in the case of a forgotten ID

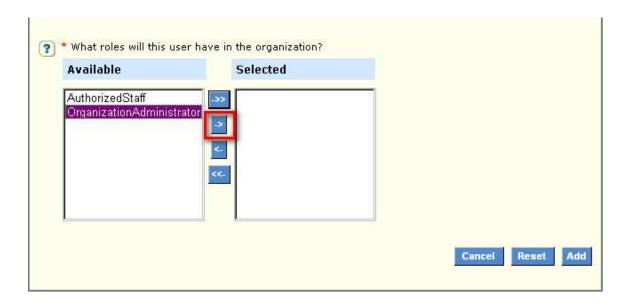
**Password \*** (required) – Establish a temporary password to be used by the Organization Administrator to authenticate them at the time of initial login.

The portal password must be a minimum of 8 characters and must include three (3) of the following four (4) requirements:

- Capital/Upper case letter
- Lower case letter
- Number
- Special character (!, \$, #, %)

**Confirm Password** \* (required) – Re-enter the password from the 'Password' box as a secondary check

To select the role, you will utilize the roles tables. To establish the user as an Organization Administrator, select that role from the 'Available' roles. Use the single arrow -> (outlined below) to move the role from 'Available' to 'Selected'.

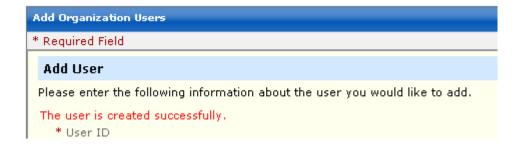




Note: If the wrong role is accidently selected, it can be moved back from the 'Selected' role to the 'Available' role column.

Once the desired role is in the 'Selected' column, click 'Add' to process the User ID.

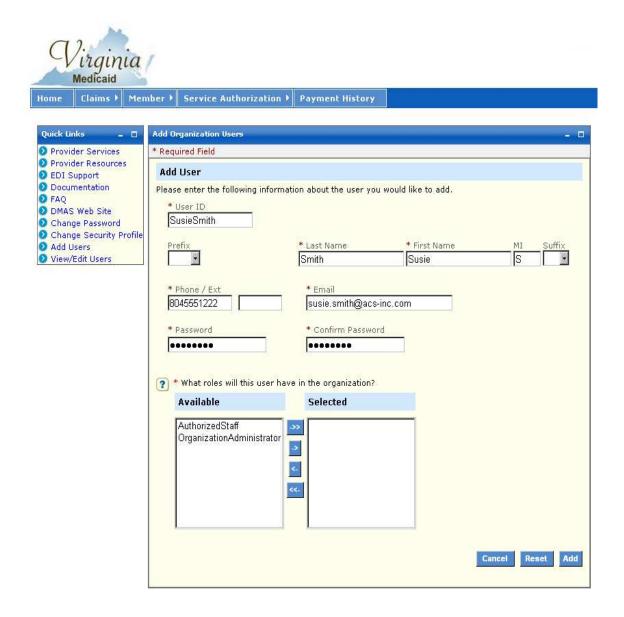
When successfully added, you'll receive an appropriate message.



## 5.3 Adding Authorized Staff

To add another user, select 'Add Users' from the Quick Links to the left or if logging in to a new session, you will need to access the Provider Home Page.

- On the Medicaid Web Portal Home Page select 'Provider' from the Login portlet
- On the Provider Login Page enter your User ID and password in the Existing User Login
- You will be directed to the Provider Home Page
- · Select 'Add Users' from the Quick Links to the left



You will need to complete a User Profile for any Authorized Staff you wish to add.

Any information that is required (noted with a red asterisk \*) will need to be supplied. Any optional fields that are known are recommended to be completed at this time as well.

- User ID \*
- Prefix
- Last Name \*
- First Name \*
- Middle Initial
- Suffix
- Phone Number \*
- Extension
- Email \*
- Password \*
- Confirm Password \*

**User ID** \* (required) – You will need to establish a unique User ID for this Authorized User. This User ID will need to be relayed to the user by the Primary Account Holder or Organization Administrator.

The User ID must be a minimum of 6 characters and a maximum of 16 characters. It can include hyphens, underscores or periods. The User ID can not start with special characters nor can it contain spaces.

**Prefix** (optional) – Enter an applicable prefix from the drop down list

**Last Name \*** (required) – Enter the Authorized User's last name

**First Name** \* (required) – Enter the Authorized User's first name

Middle Initial (optional) - Enter the Authorized User's middle initial

**Prefix** (optional) – Enter the Authorized User's suffix if applicable

**Phone Number** \* (required) – Enter the Authorized Users's contact phone number

**Ext (Extension)** (optional) – If the phone number entered is a work number with a corresponding extension, enter the extension here

**E-mail** \* (required) – Enter the email address where the Authorized User is to receive messages. This will be used only for sending temporary

passwords in the case of a forgotten password or sending the Authorized User's User ID in the case of a forgotten ID

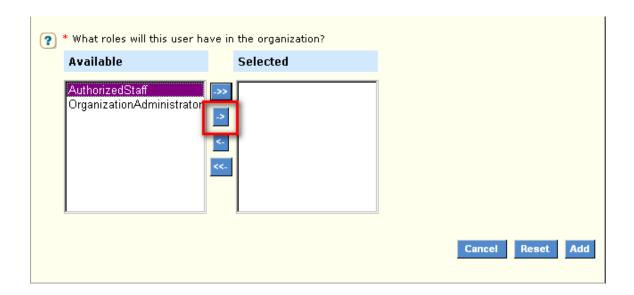
**Password** \* (required) – Establish a temporary password to be used by the Authorized Staff to authenticate them at the time of initial login. This initial password will need to be relayed to the user by the Primary Account Holder or Organization Administrator, all subsequent password changes will be emailed to the user.

The portal password must be a minimum of 8 characters and must include three (3) of the following four (4) requirements:

- Capital/Upper case letter
- Lower case letter
- Number
- Special character (!, \$, #, %)

**Confirm Password** \* (required) – Re-enter the password from the 'Password' box as a secondary check

To select the role, you will utilize the roles tables. To establish the user as an Authorized User, select that role from the 'Available' roles. Use the single arrow -> (outlined below) to move the role from 'Available' to 'Selected'.





Note: If the wrong role is accidently selected, it can be moved back from the 'Selected' role to the 'Available' role column.

Once the desired role is in the 'Selected' column, click 'Add' to process the User ID.

When successfully added, you'll receive an appropriate message.

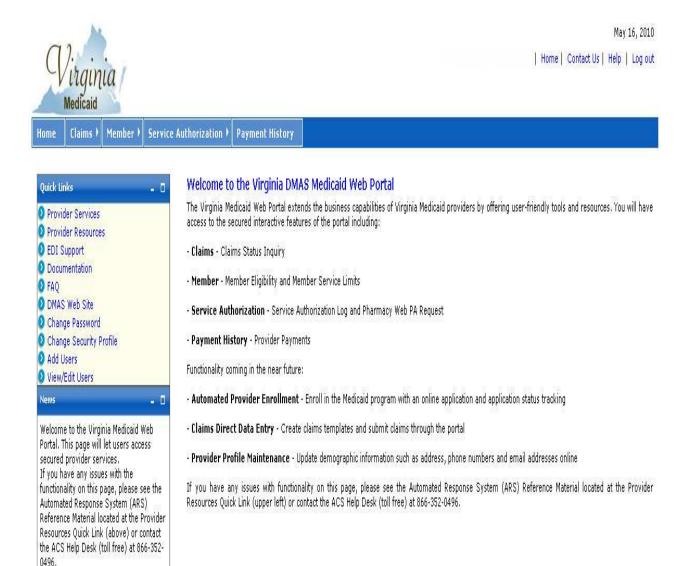


### 6.0 User Maintenance

Once you've established your organization, both the Primary Account Holder and any Organization Administrators have the ability to change a user's role, reset a forgotten password, activate or deactivate a user and unlock an ID that was locked for too many password tries.

To begin user maintenance, you need to access the Provider Home Page.

- On the Medicaid Web Portal Home Page select 'Provider' from the Login portlet
- On the Provider Login Page enter your User ID and password in the Existing User Login
- You will be directed to the Provider Home Page

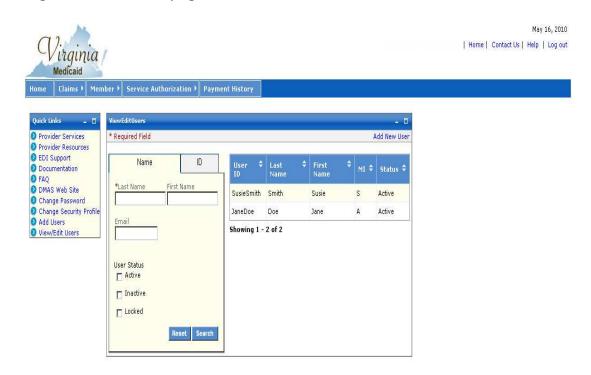


## **6.1 Accessing the User Maintenance Page**

From the Quick Links on the left, click on the 'View/Edit Users' link. The 'View/Edit Users' link will on be viewable to Primary Account Holders and Organization Adminstrators.



Clicking on the 'View/Edit Users' link will direct you to the 'Add Organization Users' page.

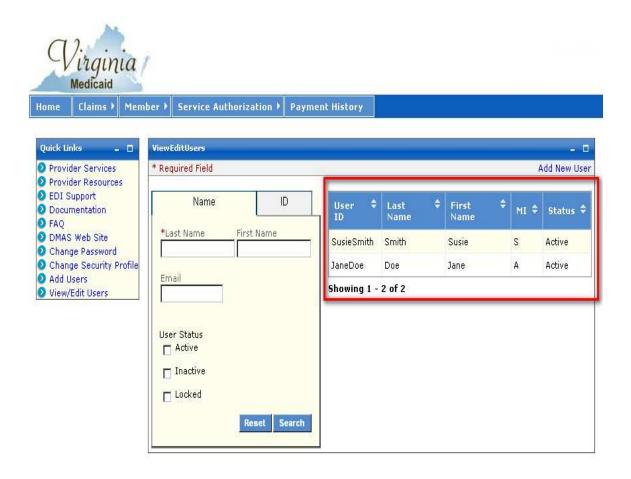


#### 6.2 User List

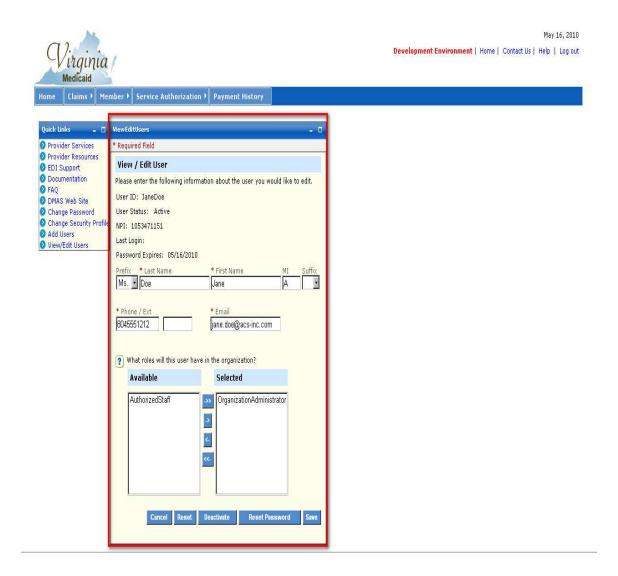
The View/Edit Users page contains the list of users associated with the Primary Account Holder. The Primary Account Holder will see any Organization Administrators and Authorized Users.

The Organization Administrator will see any Authorized Users.

The user list will see the user's User ID, Last Name, First Name, Middle Initial and the user's status (i.e. Active, Inactive).

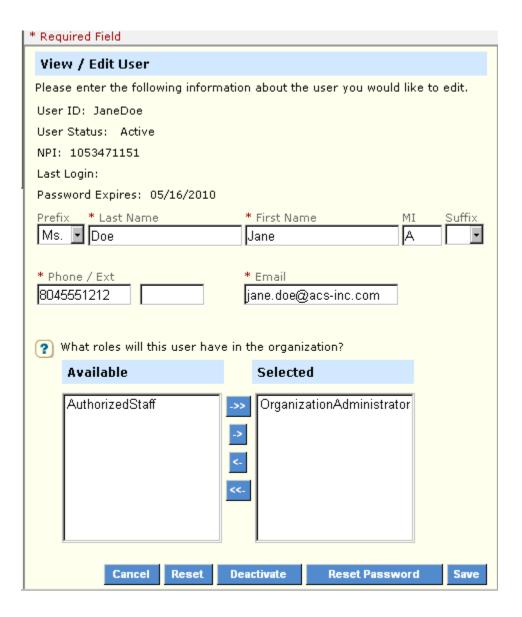


To update or modify a specific user, click on that user to retrieve their record.



The individual user record reflects the following information associated with the user:

- User ID
- User Status Active or Inactive
- NPI NPI or API the user is associated to
- Last Login the date the user last logged in
- Password Expires the date the user's current password expires
- User Name Prefix, Last Name, First Name, Middle Initial & Suffix
- Phone Number/Extension User's phone number & extension
- Email User's email address
- Role User's selected role



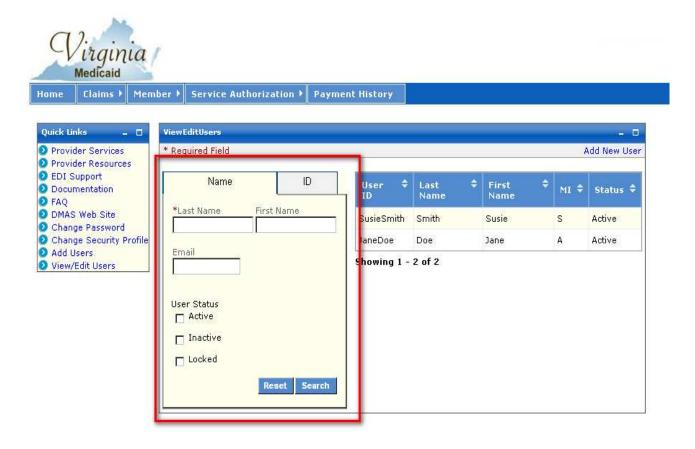
### 6.3 Searching for a Specific User

For larger organizations, there may be too many members for the list and it might be easier to search for a specific user.

There are two mechanisms to search for a specific user.

- Name
- ID

#### 6.3.1 Searching for a Specific User - Name Search



To search by a User's Name, enter the required and/or optional fields:

- Last Name \* (required) enter a full or partial last name to conduct the search on
- First Name (optional) enter a full or partial first name to conduct the search on
- **Email** (optional) enter a email address
- User Status (optional) select any additional selection criteria

If only one record meets the search criteria the individual record will be presented. If multiple records meet the search criteria the list of matches will be displayed in the User List. You will need to select one of the users and the individual record will be presented.

#### 6.3.2 Searching for a Specific User - ID Search

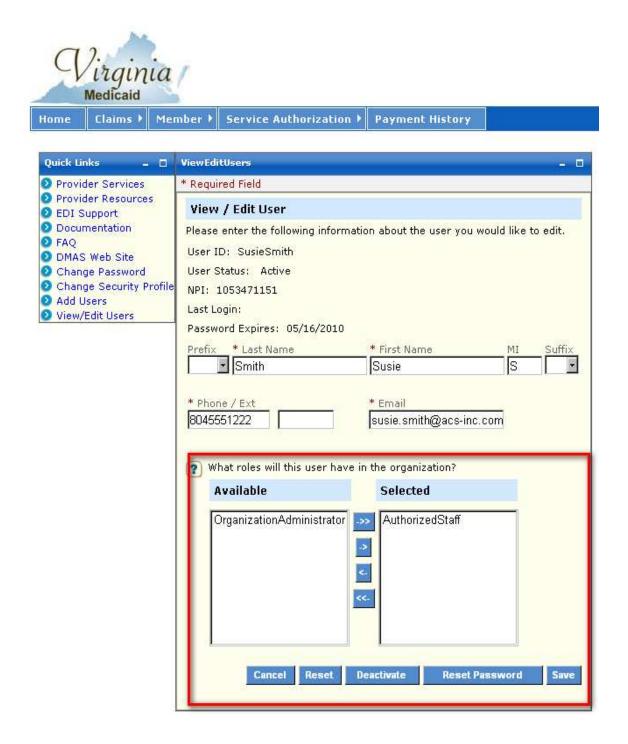


To search by a User's ID, enter a full or partial User ID to conduct the search.

If only one record meets the search criteria the individual record will be presented. If multiple records meet the search criteria the list of matches will be displayed in the User List. You will need to select one of the users and the individual record will be presented.

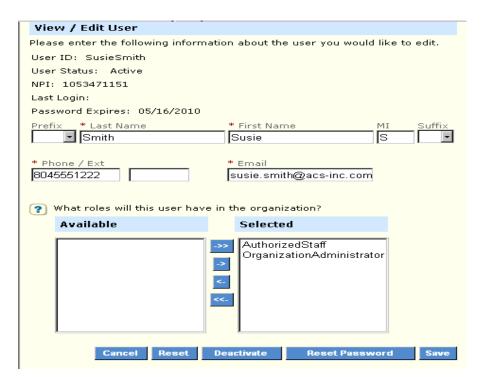
### 6.4 Changing a User's Role

To change a user's role within the provider organization, select the desired user record from the User List or conduct a Name or ID search.

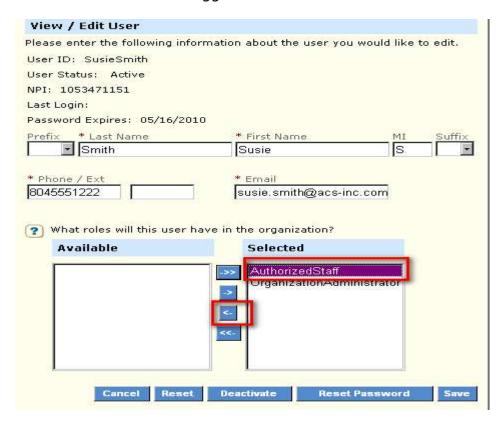


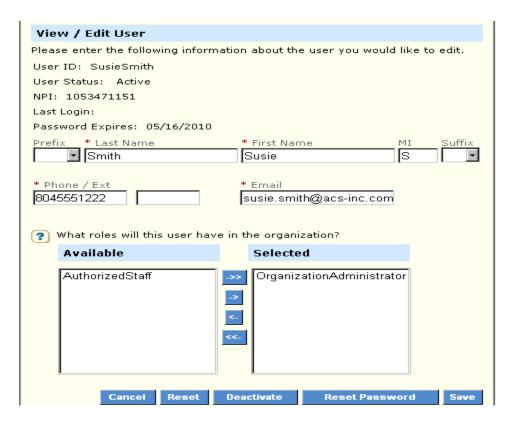
Once the user record is selected, choose the role from the 'Available' column to move to the 'Selected' column and trigger the move with the -> arrow.





If a 'Selected' role needs to be de-selected, highlight the role to be moved back to 'Available' and trigger the move with the <- arrow.

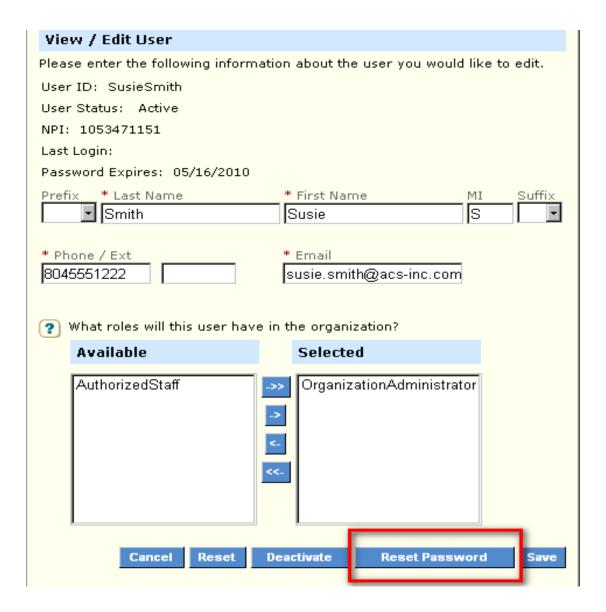




#### 6.5 Resetting a Password

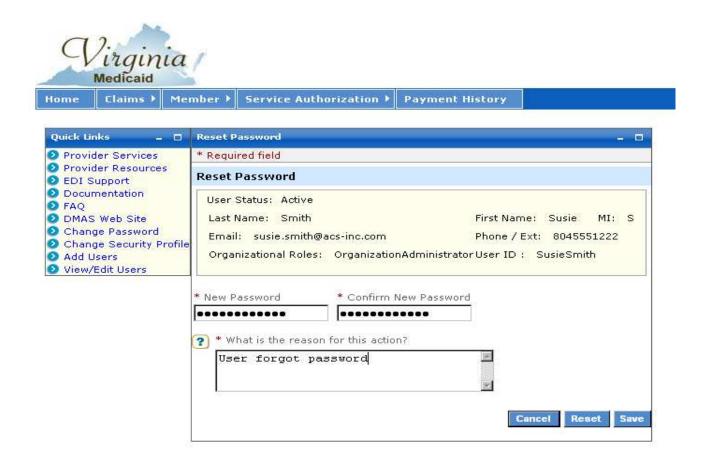
To reset a password, select the desired user record from the User List or conduct a Name or ID search.

Click on the 'Reset Password' button on the bottom of the page.



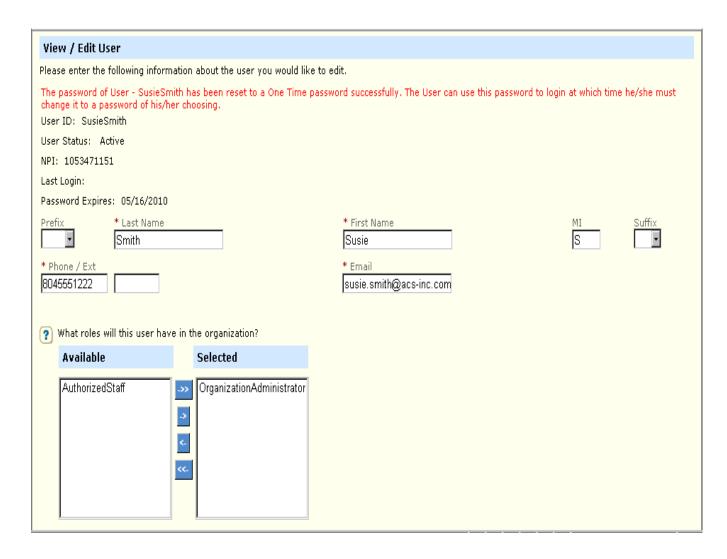
The 'Reset Password' screen below contains the selected user's information.

As the Primary Account Holder or the Organization Administrator, you need to enter a 'New Password' and 'Confirm New Password', as well as note the reason for the temporary password.



After completing the temporary password information, select 'Save'

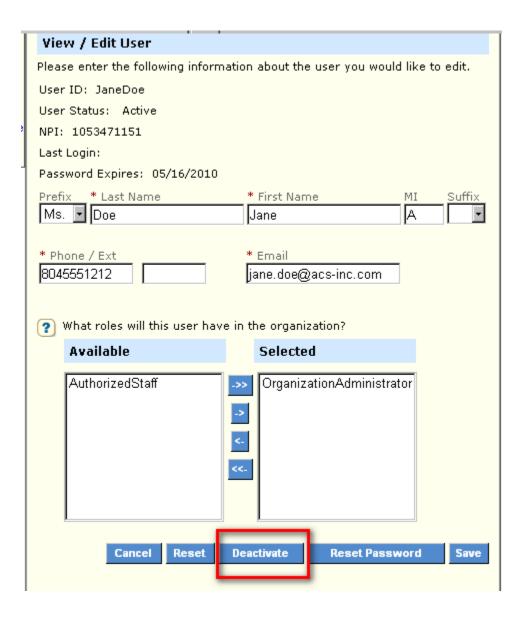
#### Web Portal - Provider Registration Users Guide



### 6.6 Activating/Deactivating a User

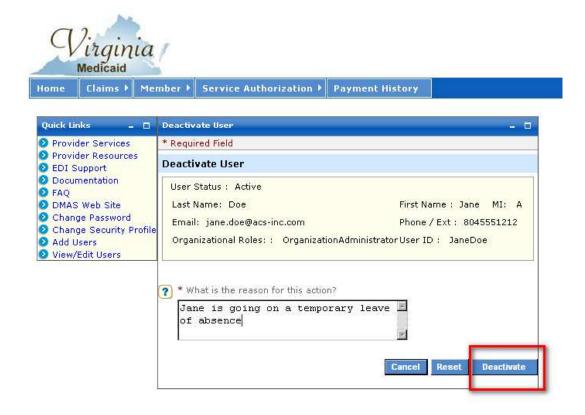
To deactivate or activate a user, select the desired user record from the User List or conduct a Name or ID search.

Click on the 'Deactivate' button on the bottom of the page. If the user had previously been deactivated, this button will say 'Activate'

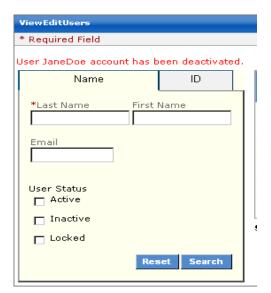


The 'Deactivate' screen below contains the selected user's information.

As the Primary Account Holder or the Organization Administrator, you need to enter a note as to the reason for the deactivation (or reactivation).



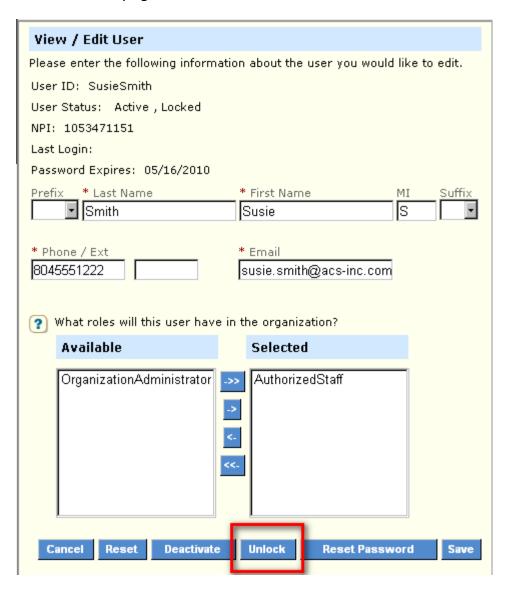
Click on 'Deactivate' to process the request.



## 6.7 Unlocking a User's ID

To unlock a user's id, select the desired user record from the User List or conduct a Name or ID search.

If a user has locked their account, an 'Unlock' button will show up on the bottom of the page.



Clicking on the 'Unlock' button will route you to the 'Unlock User' page.

Complete the reason for the unlocking and click on the 'Unlock' button.



If the unlocking was successful, an appropriate message will be displayed.



# **Appendix A – Glossary of Terms**

| Term  | Definition  |
|---|---|
| API   | Atypical Provider Identifier – assigned by the Commonwealth of Virginia for providers that are not eligible for an NPI (i.e. transportation providers)  |
| Authorized User                             | The staff that is responsible for performing provider support functions   |
| Automated Response<br>System (ARS)          | The Web Portal system that gives provider organizations access to provider support functionality such as Member Eligibility Inquiries, Service Limit Inquiries, Claims Status Inquiries, etc. |
| Navigational Tabs                           | Tabs on a portal page that will take the user to other sections in the portal or bring up documents.  |
| NPI   | National Provider Identifier  |
| Organization<br>Administrator<br>(OrgAdmin) | The person who can also establish the Authorized User role and can reset the passwords, activate and deactivate users and lock and unlock user IDs for Authorized Users.                      |
| Portlets                                    | Sections or 'boxes' that comprise a web portal page   |
| Primary Account Holder                      | The person who will perform the initial web registration and will establish the security needed to allow the access to secured provider functionality   |
| Provider Organization                       | Either an individual provider or group provider and the user community in support of them   |
| User  | Any person that will access the Web Portal and leverage the functionality within it   |

## Appendix B - Registration FAQ

Virginia Medicaid Web Portal Web Registration Frequently Asked Questions Revised 06/19/2010

## **General Questions**

## How do I access the new Virginia Medicaid Web Portal?

The new Virginia Medicaid Web Portal can be accessed through the following link: <a href="https://www.virginiamedicaid.dmas.virginia.gov">www.virginiamedicaid.dmas.virginia.gov</a>

#### When will the new Virginia Medicaid Web Portal be available?

The new Virginia Medicaid Web Portal will be available for registration verification purposes (only for those users previously registered on the First Health Web Portal) starting June 1, 2010. The fully functional web portal will be available starting June 28, 2010 at 7 A.M.

## Will the new Virginia Medicaid Web Portal have all the same functionality?

The new Virginia Medicaid Web Portal will have all of the functionality the First Health Services Corp (FHSC) web portal contained. In the near future, the Virginia Department of Medical Assistance Services (DMAS) will be rolling out other exciting new features such as online claims data entry, online provider enrollment application submission and online provider profile updates.

## When will the First Health Services Corp. (FHSC) web site be shut down?

The FHSC web site will no longer accept new registrations after May 25, 2010. The FHSC web site will no longer be available for Virginia Medicaid providers as of June 27, 2010.

## What if I'm an existing FHSC web portal user and my password expires or is forgotten after the cutoff for new registrations? Can I still get it reset?

Yes, the FHSC web site will be available until June 28, 2010. During that time if your password expires or needs to be reset, you can continue to change your password or the FHSC Help Desk will continue to be able to reset passwords.

New users will no longer be able to register after May 25, 2010.

## With the new portal, is there a new security hierarchy?

Yes. Where the FHSC web portal was user centric, the new Virginia Medicaid Web Portal is provider centric. The provider centric security will allow for the security level needed for the current functionality but for the additional security needed for future planned functionality. See 'Establishing a User Organization' FAQ Section – 'Security Roles' for additional information on the security roles.

## If I forget my password then who should I contact to have my password reset?

On the Virginia Medicaid Web Portal – Provider Login Page there is a 'Login' portlet. At the bottom of that portlet, click on the link labeled "Forgot My Password". The link will direct you to the three security questions submitted during the creation of your Security Profile. (See 'Establishing a Security Profile' FAQ Section). You will be required to answer all three security questions correctly. Enter your User ID then select continue. Your password will be emailed to the email address in your user profile; the email address entered when registering. (See 'Establishing a User Profile' FAQ Section – Completing the User Profile').

## If I forget my User ID what do I need to do to retrieve my User ID?

On the Virginia Medicaid Web Portal – Provider Login Page there is a 'Login' portlet. At the bottom of that portlet, click on the link labeled "Forgot User Name". The link will direct you to the three security questions submitted during the creation of your Security Profile. (See 'Establishing a Security Profile' FAQ Section). You will be required to answer all three security questions correctly. Enter your Email Address (previously entered in your profile when you registered, then select continue. Your User ID will be emailed to your email address. (See 'Establishing a User Profile' FAQ Section – Completing the User Profile').

## **Getting Started**

#### **Converted UAC Users**

## Has my information been converted from the First Health UAC?

Yes. All active user records existing in First Health's UAC have been converted over to the Virginia Medicaid Web Portal's user table.

Letters have been issued to the provider or group provider administrator detailing the converted users associated with the provider. The letter details the converted User IDs and temporary passwords associated with each.

## I am a user of the FHSC web site but did not receive a notice of change. What do I do?

Please contact the ACS Help Desk (toll free) at 866-352-0496. Contact information can also be located via the 'Contact Us' link on the portal (upper right corner of each portal page).

#### How do I log in to the new Virginia Medicaid Web Portal?

The new Virginia Medicaid Web Portal can be accessed through the following link: www.virginiamedicaid.dmas.virginia.gov

Once you've accessed the portal, choose 'Providers' from the 'Login' portlet on the portal's Home Page (lower right corner)

On the Provider Login page, enter the User ID and temporary password associated with the provider or group you wish to inquire upon.

If this is the initial time for logging in with this User ID and temporary password, you'll immediately be requested to change your password, based on the requirements for the establishing a password. See 'Establishing a User Profile' FAQ Section – 'Creating a Password'.

## What if I'm a converted user from the First Health portal and cannot access the portal using my User ID and temporary Password?

If you're a previously registered user of the First Health Web Portal and are having issues with the User ID or temporary password sent to your associated provider (or group provider administrator), please contact the ACS Help Desk (toll free) at 866-352-0496. Contact information can also be located via the 'Contact Us' link on the portal (upper right corner of each portal page). Please have your NPI, User ID and temporary password available. You will NOT be asked for your password.

#### How was my User ID assigned?

For users previously registered on the First Health portal, the UAC record(s) have been converted. Letters have been issued to the provider or group provider administrator detailing the converted users associated with the provider. The letter details the converted User IDs and temporary passwords associated with each. The user will need to log in to the portal by entering

the User ID and temporary password from the letter. Upon successful log in, the user will be immediately requested to reset their password, in conformance with the password criteria, as well as complete the set up of their User and Security profiles. See 'Establishing a User Profile' FAQ Section – 'Creating a Password'.

#### How was my password assigned?

For portal users that were previously registered on the First Health web portal, the user will need to log in to the portal by entering the User ID and temporary password from the letter recently sent to the user's associated provider. Upon entry of this initial password, the user will be requested to immediately change their password, in conformance with the password criteria. See 'Establishing a User Profile' FAQ Section – 'Creating a Password'.

#### How long is my temporary password valid?

It will be valid for 3 months

For users that were previously registered with the First Health web portal, your temporary password, sent in a letter to your associated provider (or group provider administrator) is valid from June 1 at 7 A.M. until the time you complete registration. At that time, you will be required to establish a new password in conformance with the password requirements (see 'Establishing a User Profile' FAQ Section – 'Creating a Password' for more details). If you do not register by September 30, 2010, your temporary password will expire and you will need to re-register.

## I have to complete a User Profile and establish a Security Profile. What are these and why do I need them?

The User Profile is part of the registration process and contains the following information. All information available in the First Health UAC has been converted. Any information that is required (noted with an asterisk \*) will need to be supplied by you at the initial login.

- Associated NPI
- User ID \*
- NPI's FEIN
- Password \*
- First Name \*
- Middle Initial
- Last Name \*
- Phone Number \*
- Extension
- Preferred email \*

The Security Profile contains three (3) security questions. Completion of three questions is required. This information is used in assistance with forgotten User IDs or passwords.

For more information, please see 'Establishing A User Profile' and 'Establishing a Security Profile' FAQ Sections

## I'm associated to multiple providers in the current UAC. On the conversion letters sent to those providers, my User ID was converted to multiple User IDs. Why?

Where the FHSC web portal was user centric, the new Virginia Medicaid Web Portal is provider centric. The provider centric security will allow for the security level needed for the current functionality but for the additional security needed for future planned functionality.

With the current FHSC web portal functionality a single User ID can be used for one-to-many associated providers (NPI). With the new Web Portal, each provider organization (a single provider or group provider) will require a unique User ID.

During the conversion process, if you were associated to multiple providers in the UAC your User ID was made unique by the addition of a hyphen and single digit number. For instance the UAC User ID 'JDoe' associated with three individual providers would now have 'JDoe', 'JDoe-1' and 'JDoe-2'. Each of these User IDs will be uniquely associated with a single provider NPI.

## I'm currently a delegated or local admin for my provider(s). How was this converted?

Each provider organization will have one (1) Primary Account Holder and one-to-many Organization Administrator(s). Delegated and Local Administrators in the UAC with managed users have been converted to Organization Administrators in the new portal. If the provider organization had only one Delegated (or Local) Administrator, that user has been converted to the Primary Account Holder. If there were multiple DelAdmins for a provider organization then the selection as to who is to be designated as the Primary Account Holder will need to be made in writing. See 'Establishing a User Organization' FAQ Section – 'Security Roles' for more information.

## **First Time Users**

I'm an enrolled provider, or user associated to an enrolled provider, who has never registered with the Virginia Medicaid Web Portal. What is involved in the registration process?

To take advantage of the portal, you or your designated Primary Account Holder, will need to register and request the generation of a Security ID. A Security ID is used to authenticate you as the provider or Primary Account Holder.

As a new user you will need to complete the following steps:

- 1. Establish a User ID, password and security profile
- 2. Initiate the authentication process
- 3. Complete identity authentication with the Security ID generated

## As a user trying to register with the Virginia Medicaid Web Portal, how do I start?

To begin the registration process, please access the portal at <a href="https://www.virginiamedicaid.dmas.virginia.gov">www.virginiamedicaid.dmas.virginia.gov</a>.

On the portal home page select 'Provider' from the Login portlet. You'll be directed to the Provider Login page where you'll see the 'First Time User Registration' portlet. Click on 'Register' to begin the registration process.

As part of this process, you'll be directed through the creation of a user and security profile. The user profile will help you to create a User ID and password. See 'Establishing a User Profile' FAQ Section.

The Security Profile will request the completion of three (3) questions. These will be needed in order to assist you should you forget your User ID or password in the future. See 'Establishing a Security Profile' FAQ Section – 'Creating Security Questions'.

After completing your profile, if you are the designated Primary Account Holder, you may request the generation of a Security ID. This Security ID will be sent to you as the provider of record.

Applying the Security ID to your security profile will complete the authentication process and establish your access to your secured provider functions. See 'Establishing a Security Profile' FAQ Section – 'Requesting and Applying a Security ID'.

You will also be able to leverage the portal to establish a user organization, enabling the addition of Organization Administrators and Authorized Staff as needed to support your organizational needs. See 'Establishing a User Organization' FAQ Section

## How is my User ID assigned?

For the first time portal user, the User ID is determined and entered by the user at the time of registration, in conformance with the User ID criteria. (See 'Establishing a User Profile' FAQ Section – 'Creating a User ID')

## How is my password assigned?

For the first time portal user the password is determined and entered by the user at the time of registration, in conformance with the password criteria. (See 'Establishing a User Profile' FAQ Section – 'Creating a Password')

## I have to complete a User Profile and establish a Security Profile. What are these and why do I need them?

The User Profile is part of the registration process and contains the following information. Any information that is required (noted with an asterisk \*) will need to be supplied by you at the initial login.

- Associated NPI
- User ID \*
- NPI's FEIN
- Password \*
- First Name \*

- Middle Initial
- Last Name \*
- Phone Number \*
- Extension
- Preferred email \*

The Security Profile contains three (3) security questions. Completion of three questions is required. This information is used in assistance with forgotten User IDs or passwords.

For more information, please see 'Establishing A User Profile' and 'Establishing a Security Profile' FAQ Sections

I'm a designated Primary Account Holder for my provider organization. I need to request a Security ID in order to complete my authentication process and gain access to secured provider functionality. What is a Security ID?

A Security ID is a mechanism for authenticating the Primary Account Holder with the associated provider.

To initiate the authentication process, you will complete the registration and then request a Security ID. See 'Establishing a Security Profile' FAQ Section – 'Requesting and Applying a Security ID'

The Security ID will be mailed to the provider (or group administrator) of record. Once received, you will apply the Security ID to complete the authentication. See 'Establishing a Security Profile' FAQ Section – 'Requesting and Applying a Security ID'

Once validated you will have access to secured provider functionality such as:

- Member Eligibility
- Member Service Limits
- Claims Status
- Service Authorization
- Payment History

I'm a designated Primary Account Holder for my provider organization. How do I establish my user organization?

The Primary Account Holder will be able to establish the provider organization, setting users up as either Organization Administrators or Authorized Staff. Organization Administrators will be able to set up Authorized Staff.

See 'Establishing a User Organization' FAQ Section for more details.

## **Establishing a User Profile**

## Creating a User ID

#### Is a User ID required for initial registration on the Web Portal?

Yes, you must create a User ID to log in to the Web Portal.

## How do I get a User ID?

For an already established organization, the Primary Account Holder and OrgAdmin for your organization have the authority to establish User IDs.

For a designated Primary Account Holder, you will need to create your User ID at the time of initial registration.

## What are the criteria for creating a User ID?

The User ID must be a minimum of 6 characters and a maximum of 16 characters. It can include hyphens, underscores or periods. The User ID can not start with special characters nor can it contain spaces.

## Creating a Password

## How was my password assigned?

If you're the designed Primary Account Holder for your provider organization, the first time you access the portal, you will create the password in conformance with the password criteria.

If you're not the designated Primary Account Holder for your organization, you will need to get your initial password from your Primary Account Holder or Organization Administrator. Upon your initial access to the portal, you will be immediately directed to change your password.

#### What are the criteria for creating a password?

The portal password must be a minimum of 8 characters and must include three (3) of the following four (4) requirements:

- Capital/Upper case letter
- Lower case letter
- Number
- Special character (!, \$, #, %)

## How often will I be required to change my password?

Passwords will need to be changed every 42 days.

## **Completing the User Profile**

## Do I need a NPI or a API to register?

No, a NPI or API is not required at the time of initial registration. An API or NPI is required at the time a Security ID is requested. If the NPI/API is known at the time of registration, it is recommended that it be entered at that time.

#### Is a SSN or FEIN required to registers on the Web Portal?

An FEIN/SSN is an optional field available to the Primary Account Holder at the time of registration.

The Security ID that is furnished as part of the authentication process will be used, along with the FEIN/SSN, your User ID and the API/NPI for initial security authentication. No other users for your organization will need this information.

## What is the length of the SSN/FEIN field?

This field must be 9 digits in length

## What is the maximum length of the characters allowed for my first name?

The maximum number of characters allowed is 25.

## Is the first name field required for registration to the Web Portal?

Yes, this is a required field.

#### What is the maximum length of the characters allowed for my last name?

The maximum number of characters allowed is 25.

#### Is the last name field required for registration to the Web Portal?

Yes, this is a required field.

## What format do I use to enter the telephone number?

You must enter 10 digits (area code and phone number) with no spaces or hyphens.

## Do I have to have an email address to register?

Yes, an email address is required. The email address is utilized to send users temporary passwords and to send users their forgotten User IDs.

## **Establishing a Security Profile**

## **Creating Security Questions**

## There are three security questions listed in the Security Profile. Do I need to pick a question from each security drop down list?

Yes, you need to choose a security question from each of the three columns. The same questions appear in each security question drop down. You are required to pick one question from each security question drop down for a total of three questions. You may not choose the same question previously chosen in another security question.

These security questions will be utilized in assisting you with a forgotten User ID or password.

## Requesting and Applying a Security ID

## Why do I need to request a Security ID?

As the designated Primary Account Holder for your organization, you will need to initiate and complete the authentication process with the use of a Security ID. Requesting and applying a Security ID is a one time process to be completed only by the Primary Account Holder.

## Do all users need to request a Security ID?

No, requesting and applying a Security ID is a one time process needed only to authenticate the Primary Account Holder.

#### How do I request a Security ID?

To request a Security ID, complete the initial registration process. From the Provider Welcome page, click on 'Request Security ID' from the Quick Links on the left.

Your security profile will be presented along with two new fields associated with the Security ID. Check the 'Generate Security ID' box. The Security ID will be generated and mailed to the provider or administrator (if a group provider) associated with your User ID from the registration process. For more complete instructions, please refer to Web Registration Reference Material under the Provider Resources tab.

While awaiting receipt of the Security ID, the Primary Account Holder can begin to establish the organization. Once the Security ID is applied, it will be associated with all users. See 'Establishing a User Organization' FAQ Section – 'Adding/Modifying Users'.

If you're a new user associated with a provider not currently enrolled in the Virginia Medicaid Program, you will need to wait for provider enrollment approval to request a Security ID.

## Who receives the Security ID?

The Security ID is mailed to the provider or group administrator of record for the user's associated NPI/API.

## How do I apply the Security ID?

Upon receipt of the Security ID from your provider or group administrator, you will need to apply the Security ID. To apply the Security ID, from the Provider Welcome page, click on 'Apply Security ID' from the Quick Links on the left. Your security profile will be presented along with the two fields associated with the Security ID. Enter the Security ID in the appropriate field. For more complete instructions, please refer to Web Registration Reference Material under the Provider Resources tab.

After the Security ID is applied, user authentication will be completed. Once authenticated, the Security ID will be associated to the Primary Account Holder and any previously established users within the organization. The Primary Account Holder or Organization Administrator can continue to establish their user organization.

## **Establishing a User Organization**

## **Security Roles**

#### What roles are part of the new Virginia Medicaid Web Portal?

The new Virginia Medicaid Portal has three (3) security roles currently established.

- Primary Account Holder
- Organization Administrator (OrgAdmin)
- Authorized Staff

#### What is a Primary Account Holder?

A Primary Account Holder is the person who will perform the initial web registration. He/she will establish the security needed to allow the access to secured provider functionality (i.e. ARS functions). The Primary Account Holder can also establish the Organization Administrator (OrgAdmin) and Authorized User roles. The Primary Account Holder can reset the passwords, lock and unlock users for OrgAdmins or Authorized Users.

## What do we do if our Primary Account Holder is no longer associated with our organization?

If your Primary Account Holder is no longer associated at your Organization or has moved to another department please contact the ACS Help Desk. For Help Desk information, click on the Contact Us link placed at the right corner of the Provider log in page.

#### How do we change our Primary Account Holder?

Any change to the Primary Account Holder must be made in writing by the provider of record (for individual providers) or the administrator of record (for groups). The request will need to go to the ACS Help Desk. For Help Desk information, click on the Contact Us link placed at the right corner of the Provider log in page

## I'm a user of the First Health web site and received a notice indicating that I need to set up a Primary Account Holder – how do I do that?

The Primary Account Holder can only be established by ACS. Primary Account Holder requests must be made in writing by the provider of record (for individual providers) or the administrator of record (for groups). The request will need to go to the ACS Help Desk. For Help Desk information, click on the Contact Us link placed at the right corner of the Provider log in page

## What is an Organization Administrator?

The OrgAdmin can also establish the Authorized User role. He/she can reset the passwords, lock and unlock User IDs for Authorized Users.

## Who can be set up as an OrgAdmin?

The Primary Account Holder can establish the OrgAdmin role for an organization.

#### What is an Authorized Staff?

The staff that is responsible for performing Automated Response System (ARS) functions such as Member Eligibility Inquiries, Service Limit Inquiries, Claims Status Inquiries, etc.

## **Adding and Modifying Users**

#### Who can add or modify users for my organization?

Only Primary Account Holders can add Organization Administrators. Both Primary Account Holders and Organization Administrators can add Authorized Staff.

#### How do I add a user?

To add a user to your organization, from the Provider Welcome page, click on 'Add User' from the Quick Links on the left.

Establish a User ID for the staff member. The User ID must conform to the User ID requirements. See 'Establishing a User Profile' FAQ Section – 'Creating a User ID' for User ID requirements.

Complete the following required user information:

- Last Name
- First Name
- Phone Number
- Email

Establish a temporary password for the staff member. The password must conform to the password requirements. See 'Establishing a User Profile' FAQ Section – 'Creating a Password' for password requirements.

Choose the user's role within the organization. Your role will determine what available roles are displayed. A Primary Account Holder will see both Authorized Staff and Organization Administrator options where an OrgAdmin will only see Authorized Staff as a role.

Note: The User ID and Password created during this process will NOT be emailed to the new user. The Primary Account Holder must provide the staff member with the User ID and Password created.

## How do I modify a previously established user?

To modify a user's information, including resetting their password, changing a user's role, deactivating or activating a user or unlocking a user who's exceeded their log in tries.

From the Provider Welcome page, click on 'View/Edit User' from the Quick Links on the left. Select desired user from list or search for the desired user based on User ID or name.

## If I want to change role assignments, do I just call the ACS Help Desk?

There are several ways to learn how to change role assignments.

- Self- Help Methods
  - Web Registration Tutorial
  - Web Registration User Guide
  - Web Registration Quick Reference Guide

All of these can be located on the portal under the Provider Resources tab – Web Registration Reference Material link

Contact the ACS Help Desk

If you have the necessary authority to make the change, the ACS Help Desk will take the user through the role modification procedure.

If you do not have the necessary role authority to make the change, ACS will not make any role changes without written authorization from the provider entity authorizing the change.

ACS will retain this authorization for audit purposes. Please submit written authorization to ACS via mail (USPS), email or fax to ACS.